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# Spain

# Exporter Guide

# 2010

**Approved By:**
Margaret E. Thursland
Agricultural Counselor
U.S. Embassy Madrid

**Prepared By:**
Arantxa Medina

**Report Highlights:**
Spain, one of the EU's fastest growing retail markets in recent years, is suffering the effects of the international financial crisis and the end of the boom in the real estate and construction sectors. Consumer confidence is falling sharply as negative economic figures are reflected in the retail sector downturn. Nevertheless, the dynamic Spanish market still offers opportunities for certain consumer-oriented food items, as well as long-term prospects for other products. This report provides guidance to U.S. companies interested in exporting high-value consumer-ready food products to Spain and includes an overview of the country's economic situation, market structure, and export requirements.

**Post:**
Madrid

## INDEX

SECTION I MARKET OVERVIEW
SECTION II EXPORTER BUSINESS TIPS
SECTION III MARKET SECTOR STRUCTURE AND TRENDS
SECTION IV BEST HIGH-VALUE PRODUCT PROSPECTS
SECTION V. KEY CONTACTS AND FURTHER INFORMATION

## APPENDIX – STATISTICS

A. KEY TRADE AND DEMOGRAPHIC INFORMATION
B. CONSUMER FOOD AND EDIBLE FISHERY PRODUCT IMPORTS
C. TOP 15 SUPPLIERS OF CONSUMER FOODS AND EDIBLE FISHERY PRODUCTS

## SECTION I. MARKET OVERVIEW

### ECONOMIC TRENDS

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010* |
|---|---|---|---|---|---|---|
| **Inflation (%) (1)** | 3.4 | 3.5 | 2.8 | **4.1** | **0.9** | **1.0** |
| **Unemployment (%) (1)** | 9.2 | 8.6 | 8.3 | **11.4** | **18.8** | **20** |
| **GDP per Capita (PPP) (USD$) (2)** | 32,800 | 33,100 | 34,800 | **35,000** | **33,700** | **33,500** |

| **AGRICULTURAL PRODUCTS IMPORTS ($ Million) (3)** | 2005 | 2006 | 2007 | 2008 | 2009* | 2010** |
|---|---|---|---|---|---|---|
| **Total Agricultural, Fish and Forestry Products** | 28,129 | 30,087 | 36,788 | 40,402 | **32,000** | **31,000** |
| **Total U.S. Agricultural, Fish and Forestry Products** | 1,185 | 1,046 | 1,697 | **1,876** | **1,000** | **1,000** |
| **Total Food Products** | 24,614 | 26,205 | 32,324 | **37,101** | **30,000** | **30,000** |
| **Total U.S. Food Products** | 954 | 815 | 1,464 | **1,730** | **1,000** | **1,000** |
| **Total Fish and Seafood Products** | 5,659 | 6,429 | 7,068 | **7,091** | **6,000** | **6,000** |
| **Total U.S. Fish and Seafood Products** | 78 | 94 | 136 | **127** | **100** | **100** |

(1) Spanish National Statistics Institute (www.ine.es)

(2) CIA World Factbook

(3) Global Trade Atlas (GTA)

(*) Estimate (**) Forecast

Spain's financial crisis and soaring unemployment rate has set the retail sector reeling. During the recent economic boom, cash purchases and consumer borrowing led retail sales to strong growth. In 2009, as unemployment and inflation rates began to rise, economic growth slowed – along with retail sales. For 2010, the grim estimate of 20 percent unemployment is expected to result in a further drop in retail food sales, consumer confidence and overall retail sales performance.

While expectations for the retail sector in 2010 are not bright, the adverse economic conditions will hopefully wane in early 2011 putting Spain on the road to economic recovery. Discount retailers and other lower-price outlets are making the most of the recession as a growing number of consumers become increasingly price-sensitive. Nevertheless, long-term prospects are hopeful. Changes in Spain's domestic market regulations, including more liberal Sunday shopping laws, are expected to give a boost to sluggish retail sales.

Spain has a diversified distribution structure for food products, ranging from traditional distribution methods --

whereby wholesalers sell to small shops that cater directly to the public -- to large multinational supermarkets and retail stores. Department stores, hypermarkets, shopping centers and very specialized outlets are introducing the customer fidelity concept, which usually involves issuing client cards, cumulative discounts and special offers for frequent customers. Innovative sales techniques are becoming increasingly popular. Vending machines have spread throughout Spain over the past decade. Direct marketing by mail order, telephone, TV or e-commerce is growing considerably.

The European Union (EU) establishes the rules and regulations governing acceptable sanitary, phytosanitary, general trade, and labeling practices in Spain. As a result, U.S. exporters already exporting to other EU countries most likely already know and can meet most of the requirements for exporting to Spain. The key for a U.S. exporter wishing to enter this market is to find an agent or distributor, or to establish a subsidiary. An experienced representative in Spain will likely be familiar with all the different consumption patterns and preferences in each of the country's 17 autonomous regions.

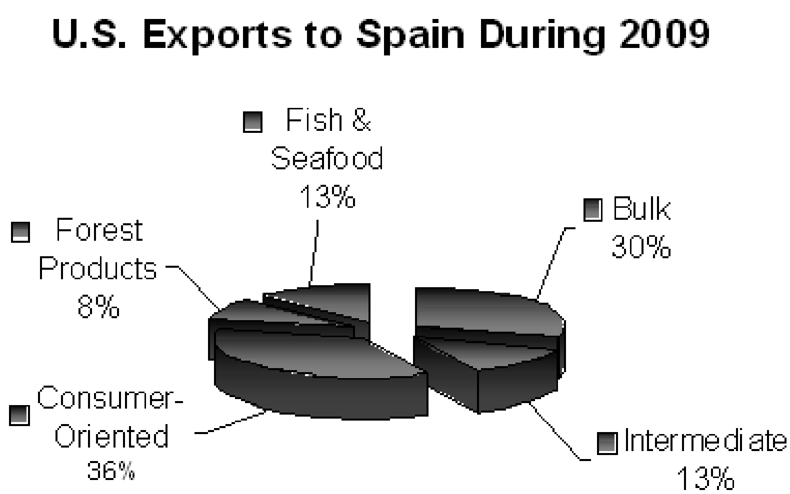
The Office of Agricultural Affairs in Madrid is dedicated to helping U.S. food and agricultural product exporters access the Spanish market. Please contact us at:

Foreign Agricultural Service
Office of Agricultural Affairs
U.S. Embassy Madrid
Serrano, 75 – Box 2000
APO AE 09642
28006 Madrid
Spain
Tel.: +34-91-587 2555
Fax: +34-91-587 2556
Email: AgMadrid@usda.gov
Web: http://www.embusa.es/

**ADVANTAGES AND CHALLENGES FACING U.S. PRODUCTS IN SPAIN**

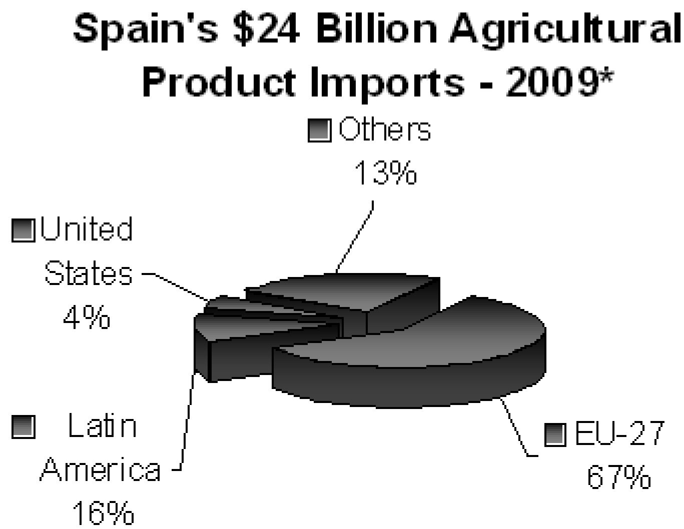
| Advantages | Challenges |
|---|---|
| Growing niche markets such as ethnic foods. | High marketing costs (advertising, discounts, etc.) |
| Interest in high-quality products. | Competition with similar food products produced in other EU countries that enter tariff free. |
| High consumer interest in new products. | Potentially higher shipping costs from the U.S. |
| Relative weakness of U.S. dollar. | Supermarket and hypermarket shelf space is expensive. |
| Reduced fish catch from European waters while consumer demand remains strong. | Reluctance to purchase products containing genetically modified ingredients. |
| Modern food distribution system. | EU labeling and packaging laws. |

**Spanish Market for U.S. Agricultural Products**




SOURCE:  U.S. Trade BICO

**Competition within Spain’s Food and Agricultural Product Import Market**




SOURCE: Global Trade Atlas
*Estimates

## SECTION II. BUSINESS TIPS FOR EXPORTERS

### Local Business Customs

Success in introducing your product to the Spanish market depends on acquiring local representation and personal contact. The advantages of local representation include market knowledge, up-to-date information and guidance on business practices and trade law, sales contacts, and market development expertise.

Spain has a number of sales channels ranging from traditional distribution methods – whereby wholesalers sell to small retail shops that sell to the public -- to large multinational supermarkets and retail stores. However, personal relationships are still very important, especially within smaller organizations. There is no substitute for face-to-face meetings with Spanish business representatives in order to break into this market.

The decision-making process within a Spanish company may be different from that in the United States. An initial "yes" usually means that the company will study the situation, and not necessarily that they will buy the product. Once a deal is struck, the Spanish company will likely expect the U.S. firm to translate into Spanish all commercial brochures, technical specifications and other relevant marketing materials. Decision makers at Spanish firms may speak English, but paperwork should be in Spanish.

The Spanish market is composed of a number of regional markets serviced by two major hubs, Madrid and Barcelona. The vast majority of agents, distributors, foreign subsidiaries and government-controlled entities that make up the economic power block of the country operate in these two hubs. Dealers, branch offices, and government offices found outside these two hubs will almost invariably obtain their supplies from their Madrid and Barcelona contacts rather than engage in direct importation.

**General Consumer Tastes and Preferences**

The traditional Spanish diet, the so-called "Mediterranean Diet" based on seafood, meat, pulses, vegetables, salads, fresh fruits, olive oil and wine, is being challenged. As consumers have less time for food preparation, the Spain market is increasingly characterized by a trend toward more novelty, less basic foodstuffs, more "natural" and delicatessen foods, and more prepared and ready-to-eat products favoring convenience. Consumers are also increasingly responding to high quality and attractive packaging.

Influenced by constant advertising in the daily and weekly press and TV, consumers tend to follow fashionable trends, use new products and adopt new consumption habits. Increased travel abroad by Spaniards, as well as a growing influx of foreign tourists and immigrants into Spain, is also increasing demand for new products, in including a heightened interest in ethnic foods. Nevertheless, Spanish consumers remain extremely health conscious when it comes to food. Problems or potential problems concerning food safety are widely publicized and usually receive immediate attention from government agencies.

The current financial crisis is influencing consumer habits and preferences as shoppers become more price sensitive, tending to purchase more store brands and trying to avoid impulse buying. This recent tendency for Spanish shoppers to reduce purchases is expected to continue in 2010.

**Food Standards and Regulations**

For more information on food standards and regulations, please consult the Food and Agricultural Import Regulations and Standards Report (FAIRS) and the FAIRS Export Certificate Report for the EU and Spain at http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp.

Also, please check the U.S. Mission to the European Union web page at http://www.useu.be/agri/expguide.html for helpful information on exporting U.S. food and agricultural products into the EU.

**General Import and Inspection Procedures**

Spain follows the Harmonized Nomenclature and Classification System (HS) and applies import duties according to a maximum and minimum rate schedule. The minimum tariff rate is applied to goods originating in countries entitled to the benefits of most-favored nation treatment -- that is, members of the World Trade Organization (WTO), including the United States, and countries with which the EU has signed trade agreements. In some instances, Free Trade Agreements negotiated between the EU and other countries provide for tariff-free access to the European market – leaving U.S. exporters at a disadvantage.

The local importer has primary responsibility with the Spanish Government for imported food products once they enter Spanish territory. Therefore, the Spanish agent/importer should guide the U.S. exporter through the entire process of marketing a U.S. food or agricultural product in Spain.

The following documents are required for ocean or air cargo shipments of food products into Spain:

Bill of Lading and/or Airway Bill
Commercial Invoice
Phytosanitary Certificate and/or Health Certificate, when applicable
Import Certificate

Most food products require an Import Certificate issued by the competent authority. The Import Certificate is obtained by the Spanish importer and/or the agent involved in the transaction and is intended for tariff classification purposes.

Please keep in mind that if the product you are exporting into Spain does not comply with EU harmonized regulations, Spanish customs or health authorities may not allow entry of the product.

For more information on import and inspection procedures in Spain, please see Food Standards and Regulations within this report.

## SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

### Food Retail Sector

The Spain retail food market is highly diversified. Hypermarkets/supermarkets, convenience stores, major discount stores and specialized stores coexist with traditional corner grocery stores and open-air markets. Yet, the total number of retail outlets has decreased significantly over the past decade.

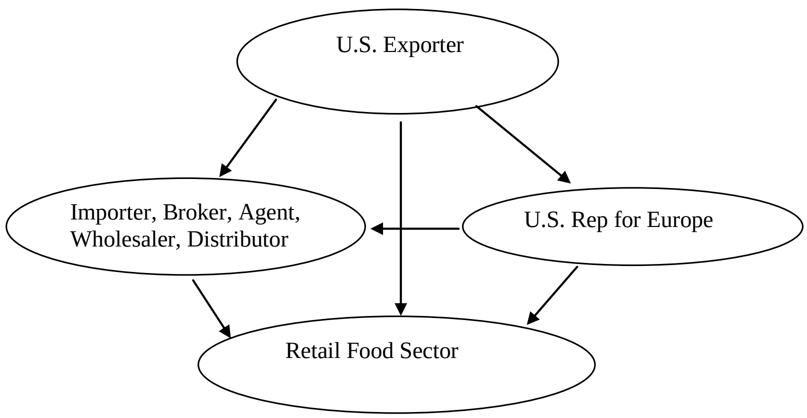
In Spain, hyper and supermarkets account for 60 percent of total food sales.

- There is increasing competition in the scope and range of product offerings, including ready-to-eat and/or ready-to-cook foods, take away meals, and home delivery - and the prices and services retailers offer consumers.

- An increasing supply of imported products has intensified competition among suppliers and retailers.

- EU Member States are the major suppliers of consumer-ready products to other EU countries.

Market Structure:




For more information on the Spanish Retail Food Sector, please consult the retail sector reports for Spain at http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp

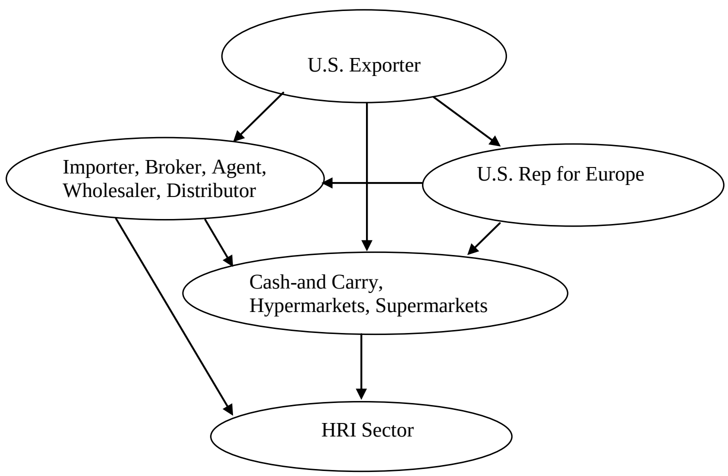
## HRI Sector

The HRI sector expanded significantly during the mid 80's and 90's and into 2008, as a result of the profound social and economic changes unleashed upon Spain's accession to the EU in 1986. In 2009, HRI expansion was hard hit by the economic, real estate and financial crises. As Spain is expected to be one of the last EU countries to recover from the current recession, the HRI downturn is expected to continue throughout 2010 and possibly into 2011.

- Spain is one of the top tourism destinations in Europe with increasing numbers of tourists every year, boosting demand for meals in the HRI sector. In 2009, the tourism sector suffered from the world financial crisis, recording an 8.7 percent decline in foreign visitors to Spain. On the bright side, this was partly offset by domestic tourism.

- In Spain, the HRI sector accounts for about one third of all food consumed.
- Restaurant chains, including ethnic and fast food, are gaining market share and are expected to continue growing.
- Consumption of ready-to-eat and take-away food continues to grow as consumers substitute home-cooking for convenience and timesaving. Most hyper and supermarket chains now offer ready-to-eat/take away food, and there is an increasing number of food outlets specializing in take-away, ranging from barbecue to more traditional meals.

Market Structure:




For more information on the Spanish HRI Sector, please consult the HRI sector reports for Spain at [http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp](http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp)

**Food Processing Sector**

The Spanish food-processing sector modernized and expanded significantly during the last couple of decades. With integration into the European Union in 1986, Spain's food-processing sector began a profound transformation, paying special attention to quality, safety and traceability of food products in order to adapt to new EU requirements. Spain now boasts some of the most competitive food processing industries in Europe, making this sector an attractive target for U.S. food-ingredient exporters.

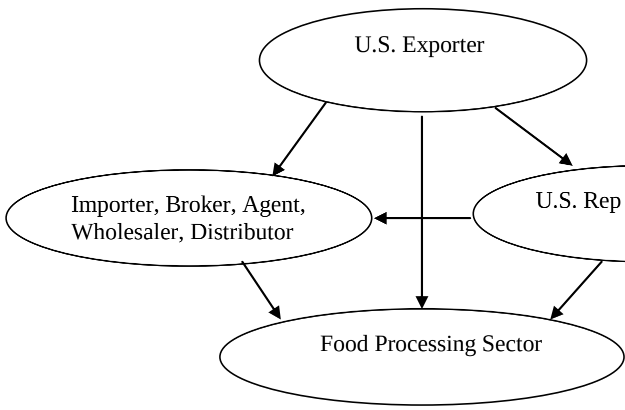
Statistics on Spain's food-processing sector for 2009 are expected to be available in April 2010. Early estimates indicate that gross production in 2009 decreased some 3.4 percent compared to 2008 to

€ 80.02 billion. As a reference, sector data for 2008 are as follows:

- The Spanish food processing sector generated just under 17 percent of Spain's total industrial production, accounting for about 8 percent of the national gross domestic product.

- The sector is comprised primarily of small companies--about 96 percent of the 31,106 food processors employ less than 50 people; 902 employ between 50 and 200 people; 197 employ between 200 and 500 people; and only 70 food processors have more than 500 employees.

Market Structure:




For more information on the Spanish food processing sector, please consult the food processing sector report for Spain at http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp

## SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

**Products Present in the Spanish Market with Good Sales Potential**

| HS Code | Product Category | 2009 Market Size ($ Million)* | 2009 Spanish Imports ($ Million)* | 6 Year Average Import Growth (%) | Key Constraints | Attraction for U.S. Exporters |
|---|---|---|---|---|---|---|
| 0303 | Frozen Fish | $959 | $787 | 3% | Heavy competition from other EU Member States and domestic suppliers. | Good reputation and reliability of U.S. producers. |

| | | | | | | |
|---|---|---|---|---|---|---|
| 080212 | Almonds | $344 | $242 | 9% | Aflatoxin issues. | Domestic consumption of tree nuts is increasing due to their utilization in the confection industry. |
| 080231 080232 | Walnuts | $125 | $92 | 9% | Competition from other EU countries. | US walnuts, both shelled and in-shell, are making inroads in Spain due to higher household income and increased awareness of the health benefits of tree nuts. |
| 080250 | Pistachios | $71 | $79 | 6% | Competition from Iran and EU importers, such as Germany, who re-export this product to Spain. | Domestic consumption of tree nuts continues to increase. U.S. pistachios have a higher quality image than Iranian, the major competitor. |
| 120100 | Soybeans | $1,290 | $1,200 | 16% | Price sensitivity and volatility. Competition from Brazil | Spain is a net importer of grains and oilseeds for feed consumption. |
| 120600 | Sunflower Seeds | $632 | $219 | 13% | Competition from Israel, Argentina and China. | Good reputation of U.S. produced confectionary sunflower seeds. |
| 0713 | Pulses | $351 | $182 | 9% | Strong competition from Canada and Argentina. | Domestic consumption of pulses is high in Spain, particularly for dry edible beans, an important component of the Spanish diet. Spanish companies also process and re-export dry edible beans within the EU market. |
| 4409 | Hardwood | $92.5 | $70 | 1% | U.S. product is considered to be expensive and used for high quality products. | The Spanish furniture sector, as well as components for the residential construction sector, has been strong, resulting in high import demand for forest products. However, the Spanish real estate market is now in crisis, as the ten-year building boom is now in recession. |

* Estimate

## SECTION V. KEY CONTACTS AND ADDITIONAL INFORMATION

If you have any questions or comments regarding this report or need assistance in exporting to Spain, please contact the Office of Agricultural Affairs in Madrid:

Local Address:
Foreign Agricultural Service
Office of Agricultural Affairs
U.S. Embassy Madrid
Serrano, 75 – Box 2000

28006 Madrid
Spain

U.S. Mailing Address:
Office of Agricultural Affairs
U.S. Embassy Madrid
PSC 61, Box 2001
APO, AE 09642

Tel.: +34-91-587 2555
Fax: +34-91-587 2556
Email: AgMadrid@usda.gov
Web: http://www.embusa.es/

Please consult our home page for more information on exporting U.S. food products to Spain.  Importer lists are also available from our office to exporters of U.S. food products.  A list of trade associations and useful government agencies is provided below:

## Spanish Trade Associations

**FIAB - Federación de Industrias de Alimentación y Bebidas**
(Spanish Federation of Food and Beverage Industries)
C/ Diego de León, 44
28006 Madrid
Tel: +34 – 91 411 7211
Fax: +34 – 91 411 7344
www.fiab.es
fiab@fiab.es

**FEHR – Federación Española de Hostelería**
(Spanish Federation for HRI Sector)
Camino de las Huertas, 18, 1ª planta
28223 Pozuelo de Alarcón
Tel: +34- 91 352 9156
Fax: +34- 91 352 9026
www.fehr.es
fehr@fehr.es

**ASEDAS – Asociación Española de Distribuidores, Autoservicios y Supermercados**
(Spanish Association for Distributors and Supermarkets)
C/ Cedaceros, 11, 2º Despacho G.
28014 Madrid
Tel.: +34- 91 429 8956
Fax: +34- 91 429 4581
www.asedas.es
direc.general@asedas.org

**ANGED – Asociación Nacional de Grandes y Medianas Empresas de Distribución**
(National Association of Midsize and Large Distributors)
C/ Velazquez, 24, 5º dcha.
28001 Madrid
Tel.: +34 - 91 522 3004
Fax: +34 –91 522 6125
www.anged.es
anged@anged.es

## Spanish Government Agencies

**Ministry of Health and Social Policy**
**(Responsible for: Imported Foodstuffs, Contaminants and Compound Residues, Health Certification, Port Inspection and EU Alerts)**
Subdirección General de Sanidad Exterior
Ministerio de Sanidad y Política Social
Paseo del Prado, 18 y 20
28014 Madrid

Tel.: +34-91-5961000
Fax: +34-91-5964480
Website: http://www.msps.es
E-mail: saniext@msc.es

**Spanish Food Safety and Nutrition Agency**
Agencia Española de Seguridad Alimentaria y Nutrición (AESAN)
C/ Alcalá, 56
28071 Madrid
Tel.: +34-91-3380392
Fax: +34-91-3380378
Website: http://www.aesan.msc.es
E-mail: informacionaesan@msps.es

**Ministry of the Environment and Rural and Marine Affairs**
Ministerio de Medio Ambiente y Medio Rural y Marino
Dirección General de la Industria y Mercados Alimentarios
Paseo de Infanta Isabel, 1
28071 Madrid
Tel.: +34 - 91 347 5361
Fax: +34 – 91 347 5770
http://www.mapa.es/es/alimentacion/alimentacion.htm

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service home page at www.fas.usda.gov.

## APPENDIX I. STATISTICS

### A. Spain's Key Trade and Demographic Information - 2009

| | |
|---|---|
| Agricultural Imports From All Countries ($Mil) / U.S. Market Share (%) [1] * | **$25,000/3%** |
| Consumer Oriented Agricultural Imports From All Countries($Mil)/U.S. Market Share (%) [1] * | **$13,000/2.6%** |
| Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%) [1] * | **$5,900/1.7%** |
| Total Population (Millions) / Annual Growth Rate (%) | **46.7/1.2%** |

| | |
|---|---|
| Urban Population (Millions) / Annual Growth Rate (%) ***** | **35.9/1%** |
| Number of Major Metropolitan Areas (over 800,000 population) | **7** |
| Per Capita Gross Domestic Product | **$33,700** |
| Unemployment Rate (%) | **18.8%** |
| Per Capita Food Expenditures (Euros) ***** | **$1,960** |
| Percent of Female Population Employed ***** | **54.9%** |
| Exchange Rate (US$1 = 1 Euro) – February 2009 | **€0.74** |

(1) Source:  Global Trade Atlas (GTA)

*Estimate

**B.  Spain's Food Imports  (US$ Millions)**

| Commodity | Total Imports Worldwide | | | Imports from the U.S. | | | U.S Market Share % | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2007 | 2008 | 2009* | 2007 | 2008 | 2009 * | 2007 | 2008 | 2009* |
| **CONSUMER-ORIENTED** | 14,415 | 15,674 | 13,000 | 339 | 364 | 350 | 2.4 | 2.3 | 2.7 |
| Snack Foods (Excluding Nuts) | 868 | 1,012 | 900 | 1 | 1 | 1 | 0.1 | 0.1 | 0.1 |
| Breakfast Cereals and Pancake Mix | 66 | 67 | 70 | 0 | 0 | 0 | 0.0 | 0.0 | 0.0 |

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Red Meats Fresh/Chilled/Frozen | 1,298 | 1,176 | 1,000 | 0 | 3 | 0 | 0.0 | 0.3 | 0.0 |
| Red Meats Prepared/Preserved | 332 | 372 | 350 | 0 | 0 | 0 | 0.0 | 0.0 | 0.0 |
| Poultry Meat | 353 | 363 | 300 | 0 | 0 | 0 | 0.0 | 0.0 | 0.0 |
| Dairy Products (Excluding Cheese) | 1,709 | 1,828 | 1,350 | 0 | 0 | 0 | 0.0 | 0.0 | 0.0 |
| Cheese | 977 | 1,178 | 1,000 | 0 | 0 | 0 | 0.0 | 0.0 | 0.0 |
| Eggs & Products | 59 | 72 | 77 | 2 | 2 | 3 | 3.4 | 2.8 | 3.9 |
| Fresh Fruit | 1,252 | 1,530 | 1,100 | 2 | 1 | 0 | 0.2 | 0.1 | 0.0 |
| Fresh Vegetables | 1,286 | 1,410 | 1,100 | 6 | 6 | 7 | 0.5 | 0.4 | 0.6 |
| Processed Fruit and Vegetables | 872 | 863 | 937 | 5 | 5 | 6 | 0.6 | 0.6 | 0.6 |
| Fruit and Vegetable Juices | 271 | 313 | 300 | 0 | 0 | 0 | 0.0 | 0.0 | 0.0 |
| Tree Nuts | 586 | 590 | 500 | 308 | 327 | 310 | 52.6 | 55.4 | 62.0 |
| Wine and Beer | 562 | 615 | 400 | 1 | 2 | 1 | 0.2 | 0.3 | 0.3 |
| Nursery Products & Cut Flowers | 299 | 283 | 230 | 3 | 4 | 3 | 1.0 | 1.4 | 1.3 |
| Pet Foods (Dog and Cat Food) | 204 | 251 | 240 | 4 | 3 | 1 | 2.0 | 1.2 | 0.4 |
| Other Consumer-Oriented Products | 3,142 | 3,665 | 3,300 | 11 | 15 | 23 | 0.4 | 0.4 | 0.7 |
| | | | | | | | | | |
| **FISH & SEAFOOD PRODUCTS** | 7,068 | 7,091 | 5,900 | 136 | 127 | 100 | 1.9 | 1.8 | 1.7 |
| Salmon | 209 | 201 | 220 | 6 | 6 | 9 | 2.9 | 3.0 | 4.1 |
| Surimi | 114 | 128 | 100 | 13 | 23 | 13 | 11.4 | 18.0 | 13.00 |
| Crustaceans | 1,806 | 1,771 | 1,350 | 51 | 50 | 40 | 2.8 | 2.8 | 3.0 |
| Groundfish and Flatfish | 1,616 | 1,566 | 1,300 | 47 | 26 | 20 | 2.9 | 1.7 | 1.5 |
| Molluscs | 1,343 | 1,378 | 1,000 | 7 | 8 | 6 | 0.5 | 0.6 | 0.6 |
| Other Fishery Products | 1,980 | 2,047 | 1,800 | 12 | 14 | 20 | 0.6 | 0.7 | 1.1 |
| | | | | | | | | | |
| **AGRICULTURAL PRODUCTS TOTAL** | 26,148 | 30,515 | 25,000 | 1,297 | 1,574 | 700 | 4.96 | 5.16 | 2.80 |
| **AGRICULTURAL FISH & FORESTRY TOTAL** | 36,788 | 40,402 | 32,500 | 1,698 | 1,878 | 1,000 | 4.62 | 4.65 | 3.08 |

Source: GTA

*Estimate

**C. Spain's Top 15 Food Import Suppliers**

| **SPANISH IMPORTS OF CONSUMER-ORIENTED FOOD PRODUCTS (US$ 1,000)** | | | | **SPANISH IMPORTS OF FISH AND SEAFOOD PRODUCTS (US$ 1,000)** | | | |
|---|---|---|---|---|---|---|---|
| | 2007 | 2008 | 2009* | | 2007 | 2008 | 2009* |
| | | | | | | | |
| France | 3,211,853 | 3,537,045 | 3,000,000 | Morocco | 592,742 | 686,873 | 550,000 |
| Germany | 1,825,886 | 2,113,807 | 1,900,000 | Argentina | 442,586 | 447,408 | 370,000 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Netherlands | 1,590,097 | 1,651,771 | 1,400,000 | France | 468,370 | 431,413 | 310,000 |
| Italy | 1,008,023 | 1,057,849 | 1,000,000 | Ecuador | 268,794 | 409,379 | 300,000 |
| Ireland | 828,556 | 888,905 | 700,000 | Netherlands | 433,896 | 391,448 | 350,000 |
| Portugal | 729,802 | 885,064 | 800,000 | Portugal | 306,666 | 361,383 | 260,000 |
| Belgium | 685,214 | 790,402 | 700,000 | United Kingdom | 429,141 | 350,215 | 300,000 |
| United Kingdom | 487,793 | 555,581 | 400,000 | China | 316,756 | 309,025 | 300,000 |
| Denmark | 430,573 | 438,572 | 360,000 | Denmark | 286,880 | 287,808 | 240,000 |
| United States | 339,538 | 364,517 | 350,000 | Namibia | 251,187 | 259,635 | 220,000 |
| Morocco | 507,105 | 291,659 | 250,000 | Italy | 271,484 | 257,027 | 200,000 |
| Peru | 227,683 | 272,057 | 210,000 | Chile | 216,960 | 223,343 | 200,000 |
| Austria | 223,331 | 247,079 | 200,000 | Vietnam | 139,424 | 158,988 | 165,000 |
| Brazil | 303,666 | 240,031 | 190,000 | India | 179,977 | 158,955 | 140,000 |
| China | 219,687 | 238,726 | 170,000 | South Africa | 150,744 | 152,384 | 100,000 |
| Other | 1,795,898 | 2,100,741 | 1,870,000 | Other | 2,312,390 | 2,206,071 | 1,795,000 |
| World | 14,414,706 | 15,673,807 | 13,500,000 | World | 7,067,998 | 7,091,353 | 5,800,000 |

Source: GTA

* Estimates